

DEPARTMENT OF SOCIAL SERVICES
744 P Street, Sacramento, CA 95814



April 29, 1980

ALL-COUNTY INFORMATION NOTICE I-43-80

TO: ALL COUNTY WELFARE DIRECTORS
FAMILY SERVICES DIVISION CHIEFS
COUNTY ADMINISTRATIVE OFFICERS
DISTRICT ATTORNEYS
COUNTY DATA PROCESSING MANAGERS
CHAIRPERSON, COUNTY BOARDS OF SUPERVISORS

SUBJECT: STATEWIDE PUBLIC ASSISTANCE NETWORK BULLETIN (SPAN)

The attached informational bulletin is the second of a series of updates on the status of the Statewide Public Assistance Network (SPAN). These bulletins will be released periodically as significant milestones are achieved.

Should you wish to discuss any aspects of the SPAN concept, please contact me at (916) 322-7443.

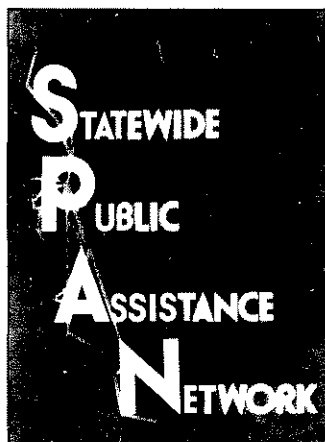
Sincerely,

A handwritten signature in dark ink, appearing to read "Joseph A. Kelly", is written over a horizontal line.

JOSEPH A. KELLY
Deputy Director
Centralized Delivery
System

DEPARTMENT OF SOCIAL SERVICES

744 P Street, Sacramento, CA 95814
(916) 323-3466



**A Project to Centralize the Delivery
of Public Assistance Benefits in California**

BULLETIN

NO. 2

April 29, 1980

The Centralized Delivery System (CDS) Project has been a beehive of activity the last few months. Project teams have been working closely with both DSS program staff and county staff to complete the study phase of the project.

Efforts have been directed to not only seeking input from various entities, but toward disseminating information to various groups affected by this undertaking. This second bulletin is designed to give you an update on our current activities and to give you some idea where we will be heading during the next few months.

SPAN UPDATE

The SPAN work plan was modified in January to better define the job to be done. The more significant changes to the work plan include putting more emphasis on the detailed development of the Feasibility Study Report and allowing more time to test the system in one or more pilot counties. The pilot operation will use a modular approach over a 15-month period in order to test and perfect modules before the total system is operational and ready for implementation statewide. We will also make extensive use of simulation models starting with identified alternatives in the Feasibility Study. The models will provide the necessary data to insure that the mechanics of the system are adequate to support the SPAN workload before final decisions are made on the system structure. Key milestones in the SPAN work plan include:

Program Needs Identified (Current Environment Report)	March 31, 1980	Completed
Draft of Work Plan for Implementation to Counties	May 1, 1980	Completed

Work Plan for Implementation to Joint
 Legislative Budget Committee
 System/Program Requirement Report
 Pilot County(ies) Selection
 Feasibility Study Report
 Hardware Requirements to Legislature
 Begin Pilot Operation(s)
 Annual Progress Report to Legislature
 AB 8 Implemented

June 1, 1980
 July 15, 1980
 December 15, 1980
 January 31, 1981
 April 1, 1981
 October 1, 1981
 March 1, 1982 through 1986
 July 1, 1984

Activities to Date:

- Staffing

Recruitment efforts have been successful to the extent that all our positions are filled for the Phase I staffing plan. Phase II staffing plans have been submitted to the Department of Finance. Initial approvals have been received and recruitment efforts are underway. Phase III of our staffing plans will commence around October 1980.

- Project Management and Control

Project plans, task lists, and schedules have been prepared for the entire project from needs analysis through implementation. A project methodology and documentation method has been adopted and a project control system has been implemented to account for project cost and to aid monitoring and controlling actual versus scheduled work with respect to elapsed time and dates.

- System Review Questionnaire

With the help of the CWDA SPAN Technical Committee, a Systems Review Questionnaire was developed and sent to counties in February. Of the 42 counties to whom questionnaires were submitted, 36 responded. Data from the questionnaires has been analyzed, again with assistance of the CWDA Technical Committee, and a report will be published in May, 1980.

This information will be useful in the selection of county operational systems which will be reviewed in depth by project staff for consideration in the design of SPAN. While basically an internal report to document decisions made in selecting systems to be reviewed, this report will be available for distribution to those interested.

- Current Environment Reports

These Physical Data Flow Diagram Reports, providing the first cut at the program requirements, were completed on schedule, March 31, 1980. Project teams along with program staff studied the current physical environment which must be maintained to satisfy program requirements. The Current Physical Environment Data Flow Diagram Reports are undergoing reviews by various State program staff, CWDA and the Family Support Council to ensure that the reports accurately reflect the minimum requirements. Any deficiencies noted will be incorporated in

the reports. The refinement of these Reports will then provide the basis for further analysis culminating in a July report which will set forth the logic for the new SPAN system.

- Data Dictionary

Along with the Current Environment Reports, a data dictionary has been established which precisely defines in a single source all the terms used in the Data Flow Diagrams and narratives. As new detail is documented and additional terminology is used, it will be included in building the data dictionary.

- Federal Financial Participation

An Advanced Planning Document has been prepared and submitted to the Federal Government for review and approval of federal financial participation. The CDS Deputy Director met with key approval staff in Washington, D.C. and was successful in obtaining verbal approval for the project, and fiscal approval through April 30, 1981. Written approvals are expected by approximately the end of April. In addition, he was able to meet with several members of the California delegation and gained their support of the SPAN project.

- External Affairs Manager

The position of External Affairs Manager for the CDS Project has been filled with the appointment of Bob Whittaker to that post, effective April 1, 1980. This key position reports directly to the Deputy Director, CDS.

The Department of Social Services contracted with San Diego County to obtain Mr. Whittaker's services. Mr. Whittaker has held various positions in several county welfare departments, including that of Director of Merced County Department of Human Resources and was most recently employed by San Diego County Department of Public Welfare in the capacity of Chief, Social Services Division and Employment Services Division. In addition, he has served as President of the California Welfare Directors Association.

It is expected that with his background he will contribute to ensuring that the SPAN project receives the county operational expertise necessary to assure its successful implementation. Specifically, the External Affairs Manager role will include acting as an advocate on behalf of counties who must adjust to, implement and operate the SPAN system; assuring appropriate input to project staff relative to county program operation concerns; acting as a spokesperson for the project when interacting with county management and executive staff, and providing technical and analytical guidance to the project in identifying and solving problems which bridge both county and state systems. County concerns can be addressed to Mr. Whittaker at the Department of Social Services, 744 P Street, M.S. 14-51, Sacramento, CA 95814, (916) 323-3466.

ADVISORY COUNCIL

The first meeting of the Centralized Delivery System Advisory Council was held in Sacramento on February 7, 1980 and the second on March 27, 1980. The Council, established to offer advice and recommendations to the Department for its consideration in the formulation of SPAN policies and procedures, consists of the following members and their affiliation:

Russ Bohart, Director	Health & Welfare Data Center
Dan Brunner, Directing Attorney	Western Center on Law and Poverty
Dick Canton, Acting Chief Deputy	Los Angeles County
Larry Combs, Assistant CAO	Kings County
Bob Coughran, Systems Analyst	Sacramento County DA Office
Masako Dolan, Consultant	Assembly Human Resources Committee
Dennis Flatt, Consultant	Senate Health & Welfare Committee
Jon Heinzer, Supervising Investigator	Sacto. County Domestic Relations Division
Hadley Johnson, Legislative Analyst	Legislative Analyst Office
Joe Kelly, Deputy Director	Department of Social Services
Elizabeth Lyman, Deputy Director	Department of Health Services
Don McCorquodale, Supervisor	Santa Clara County
Dave Nichols, County Manager	San Mateo County
Librado Perez, Director	Alameda County Welfare Department
Doris Soderberg, Chief	Department of Health Services
Carol Spiller, Director, Data Processing	County of Sutter
John Sullivan, Research Director & Chief Counsel	California Taxpayers Association
Harriet Weidner, Supervisor	Orange County
Paul Wiley, Director	Riverside County Department

The membership was selected to ensure a broad spectrum of advice and input from all entities having a legitimate interest in this endeavor. The CDS staff will meet regularly with the Council, keeping it advised of project status, and soliciting recommendations on key issues. This forum will have ample opportunity to review and comment on a number of significant issues affecting the successful implementation of SPAN which will arise throughout all phases of the Project.

The initial Advisory Council meeting agenda included an overview of the SPAN concept and components, a status report and a variety of discussion issues, including the impact of Proposition 9 (Jarvis II).

The second Advisory Council meeting primarily dealt with the role of the Council in providing advice on policy issues and a methodology for bringing issues to the attention of the project. An issue form was distributed as an aid in formulating and submitting issues for consideration to the project. In addition, information was shared with the Council relative to other states' experiences in putting together systems of this nature.

PRESENTATIONS

In an effort to assure that all affected entities are aware of the Statewide Public Assistance Network (SPAN), a number of presentations and briefings have been made over the last few months.

Individual counties have requested presentations to acquaint their staff with SPAN and its potential impact on county operations. Various departments within counties were represented including Data Processing, District Attorney/Family Support, Auditor/Controller, and Welfare. A good deal of interest has been generated, with some affected entities seeing benefits not previously considered.

Additional presentations are scheduled for the coming months. If enough interest exists, we will consider regional presentations, as well as the individual county/group briefing.

Staff from federal agencies, including FNS, DHEW and the GAO attended a SPAN presentation in January. In addition, presentations have been made to individual groups such as the California Association of County Data Processors (CACDP), Family Support Council and staff from several California congressional representatives' district offices.

The objectives of these presentations have been to make those affected entities aware of SPAN, as well as serving as an avenue of additional input for the Project.

Multi-State Presentations

In an effort to learn from others' experiences, a number of states were invited to participate in presentations explaining their experiences in designing and implementing systems such as SPAN. The states of Texas, New York, Virginia, Illinois and Wisconsin accepted the invitation and over a three-day period shared with us their successes and sorrows in attempting to bring up these complex systems. Much valuable information from both a technical nature and program perspective was gleaned from those three days and is being put to use by the project staff.

Some of their suggestions included: A single application form for all aids, establishing standardized statewide procedures prior to the implementation of SPAN, a modular implementation approach and above all, to keep a sense of humor.

In attendance were staff from the SPAN Project, various DSS program areas, Department of Health Services, the Controller's office, as well as welfare directors, program staff and data processing staff from counties.

PLACER COUNTY PRE TEST

Plans have been completed to implement the Case Data System in Placer County. This project is a first where a county welfare department will be receiving data processing services directly from the State.

The project plan currently calls for implementation of this system on state equipment at the Health and Welfare Data Center (HWDC) by July, 1980. The primary objectives of this project are:

- A. To provide the SPAN Project with the opportunity to test and assess system design concepts using live data files before modules become finalized as the SPAN design. The files for Placer County will be updated and maintained at the HWDC giving the SPAN staff ready access to the data files for testing purposes. Testing will, of course, be accomplished in such manner as to not disrupt file integrity or Placer County operations.
- B. To provide the SPAN Project staff with experience in implementing a comprehensive data processing welfare system. This will give SPAN staff an opportunity to observe the process and identify any potential problems thereby facilitating implementation in the pilot process.

The project has been underway now for approximately one and one-half months. Most of the time has been spent on: Defining the responsibilities of the state and county; negotiating a contract agreement with Health and Welfare Data Center to provide processing service; negotiating a contract agreement between the State Department of Social Services and Alpha Beta Associates for the software conversion; developing a task list and timetable for the development; and finalizing the advanced planning document (APD) prior to its issuance to HEW for their review and approval of financial participation.

COUNTY EDP REPORT

The County EDP Branch is continuing to work with county welfare departments and district attorney offices on review of modifications to existing county systems and development of new systems. Although some county proposals for development projects have been disapproved on the basis of guidelines issued in All-County Letter No. 79-66 (Centralized Delivery System), most have been approved. It appears that most counties are adhering to the guidelines in ACL 79-66 voluntarily.

Program staff reviews of county proposals, a normal part of the review process, are being augmented by a concurrent review by SPAN project staff. We hope that, as the SPAN project progresses and the system becomes better defined, project staff, as part of their review, will be able to offer suggestions to counties to improve the compatibility of their proposals with the SPAN system.